USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is March 25, 2021

WEEKLY HIGHLIGHTS

Wheat and Corn Boost Total Grain Inspections

For the week ending March 11, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.4 million metric tons (mmt). Total grain inspections were up 23 percent from the previous week, up 75 percent from last year, and up 51 percent from the 3-year average. The rise in total grain inspections from the previous week reflected a 41-percent rebound in wheat inspections and record-high corn inspections—up 32 percent. Inspections of soybeans, however, dropped 13 percent from the previous week. In the Pacific Northwest, total grain inspections rose 20 percent from the previous week and, in the Mississippi Gulf, increased 29 percent. Year-to-date numbers and the 4-week averages remained strong for grain inspections.

Mississippi River Grain Barge Operations Continue To Improve

High water conditions on the Ohio River improved in the second part of the week ending March 13, and barge operations continued to normalize. Water levels are expected to drop more for the rest of this week. Three hundred fifty-eight empty upbound barges passed through the Olmsted Locks and Dam, 58 percent more than the previous week (***GTR* fig. 11**). Apart from minor-to-moderate high water conditions in the St. Louis area and some Lower Mississippi River locations, grain barge logistics for most of the Mississippi River have continuously improved since the beginning of March. The U.S. Army Corps of Engineers expects to re-open Mississippi River Lock 25 (near Winfield, MO) early next week. The reopening will allow the industry to prepare for the 2021 navigation season on the Upper Mississippi River. The season typically starts in late March or early April when the first vessel passes through Lock and Dam 2 (near Hastings, MN).

ATRI Releases Annual Report on Truck Bottlenecks

The American Transportation Research Institute (ATRI) released its annual *Top 100 Truck Bottlenecks Report.* Using global positioning service (GPS) data from more than 1 million freight trucks, the analysis measured levels of truck-involved congestion at over 300 locations on the national highway system. Twenty-nine States were found to have at least one bottleneck. For the third consecutive year, New Jersey was found to have the worst bottleneck. In 2020, the average peak-hour truck speed at bottlenecks was 43 miles per hour. This was 34 percent higher than in 2019 because of reduced traffic resulting from COVID-19 stay-at-home orders. Reduced traffic both sped up many construction projects and limited slowdowns in construction zones. In March 2020, average truck speeds at some of the worst locations improved by 100 percent or more from a year earlier. In February 2020, truck activity increased because of panic buying, then immediately decreased in March because of business shutdowns. Normal levels of activity resumed in April and May.

Snapshots by Sector

Export Sales

For the week ending March 4, **unshipped balances** of wheat, corn, and soybeans totaled 44.9 mmt. This was 4 percent lower than last week, but still represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** were 0.396 mmt, up significantly from the past week. Net **soybean export sales** were 0.351 mmt, up 32 percent from the previous week. Net **wheat export sales** were 0.330 mmt, up 50 percent from the previous week.

Rail

U.S. Class I railroads originated 26,451 **grain carloads** during the week ending March 6. This was a 12-percent increase from the previous week, 27 percent more than last year, and 26 percent more than the 3-year average.

Average March shuttle **secondary railcar** bids/offers (per car) were $328 above tariff for the week ending March 11. This was $41 less than last week and $459 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending March 13, **barge grain movements** totaled 810,186 tons. This was 5 percent lower than the previous week and 52 percent higher than the same period last year.

For the week ending March 13, 512 grain barges **moved down river**—13 barges fewer than the previous week. There were 851 grain barges **unloaded in New Orleans**, 1 percent fewer than the previous week.

Ocean

For the week ending March 11, 45 **oceangoing grain vessels** were loaded in the Gulf—15 percent more than the same period last year. Within the next 10 days (starting March 12, 2021), 55 vessels were expected to be loaded—31 percent more than the same period last year.

As of March 11, the rate for shipping a metric ton of grain from the U.S. Gulf to Japan was $57.75. This was unchanged from the previous week. The rate from PNW to Japan was $32.50 per metric ton, 1 percent more than the previous week.

Fuel

For the week ending March 15, the U.S. average **diesel fuel price** increased 4.8 cents from the previous week to $3.191 per gallon, 45.8 cents above the same week last year.

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Feature Article/Calendar

New Research Compares Rail Regulations Between the United States and Canada

The description and findings contained in this article are drawn from recent USDA-sponsored research from James Nolan, Chi Su, Logan Pizzey, and Steven Peterson.[1] The full report and a brief summary are available online.[2]

An ongoing, key challenge for rail regulators is to balance the competing needs of shippers and railroads. However, regulatory "best practices" that ensure an efficient and fair rail system are not always obvious. In the United States and Canada, two rail systems have emerged. They share key similarities and yet have distinct differences: each system is a product of its country's particular shipping conditions and regulatory philosophies. These differences create potential for each country's regulatory body—the Surface Transportation Board (STB) in the United States and the Canadian Transportation Authority (CTA) in Canada—to learn from its cross-border counterpart. This article briefly highlights findings on where the neighboring countries' rail operations and regulations coincide and where they diverge.

Comparison of Rail Operations in the United States and Canada

Although policy differences account for some variation between U.S. and Canadian rail transportation of grain, grain marketing and geography are also major factors. One key difference is scale—the U.S. rail system handles roughly 10 times more grain than the Canadian system. Further, the United States fulfills considerably higher domestic grain demand than Canada, which exports most of its grain production. Geographically, the Canadian network is simpler, running mostly linearly east to west, while the U.S. complex planar network spans much of the country (table 1).

Table 1: Select characteristics of the U.S. and Canadian grain transportation systems.

Characteristic	Canada	United States
Network topography	Linear, long	Planar, widespread
Grain destinations	3 primary ports (1 East, 2 West)	Multiple inland ports and several ocean ports serving East, West, and South
Competition in transportation	Spatial monopoly/oligopoly—2 Class I railways, several short lines	Regional differentiation from monopoly to competition; multiple Class I railroads, but largely duopoly carriers, each in the East and West; short lines as well as barge operators
Regulation	Rail revenue monitoring, several limited competitive access provisions	Cost assessments, revenue adequacy, some limited access provisions
Number of primary firms in the supply chain	2 Class I railroads, several large grain companies	7 Class I railroads, dozens of barge operators, and grain companies
Price/volume setting	Tariffs, private contracts, limited car auctions	Tariffs, private contracts, car auctions
Grain elevation, storage	424 elevators, 11.7 million-ton capacity, limited on farm capacity	Roughly 8,500 elevators, >320 million-ton capacity, considerable on-farm capacity (>375 million-ton capacity)

Source: Table 1 from the study.

In terms of specific operational metrics, U.S. railroads require fewer cars and employees, but more fuel, to move the same freight volume as Canadian railroads. Grain trains move 15 to 20 percent faster (about 3 miles per hour) in the United States, though dwell times are longer. Given these differences, the researchers conclude, Canadian trains are more efficient than U.S. trains for short trips. In contrast, U.S. trains perform better on longer hauls, where dwell times make up a smaller portion of the total trip. In Canada, 25 percent of the grain cars are government-owned, with the remainder owned (or leased) by industry (shippers and railroads). In contrast, all grain cars in the United States are owned (or leased) by industry.

Comparison of Rail Regulation in the United States and Canada

Throughout much of railroads' history, they have faced substantial regulation in both the United States and Canada. Prior to 1980, railroads in the United States could not set rates according to market forces—for instance, through volume discounts and service contracts with individual shippers. For decades, Canadian rail rates were subsidized, and they were capped in the late 1990s.

[1] James Nolan is a professor, Chi Su is a research technician, and Logan Pizzey is a former graduate student at the University of Saskatchewan, Department of Agricultural and Resource Economics. Steven Peterson is Research Scientist at Oak Ridge National Laboratory.

[2] The Transportation Services Division (TSD) of USDA's Agricultural Marketing Service continually sponsors cooperative research on transportation matters relevant to USDA stakeholders. Visit our Cooperative Research Summaries page to access the full list of cooperative research reports and summaries. This research investigates issues affecting all major modes of agricultural transportation—truck, rail, barge, and ocean. Past projects have covered changes in rail rates over time, effects of barge traffic disruptions on shipping costs, protection of perishable food in trucks, container availability in the Pacific Northwest, and many other topics.

In the decades since deregulation (in the 1980s for the United States and 1990s for Canada), many of the rules governing railroads have evolved in both countries. Table 2 provides a synopsis of key components of current regulations by country.

Table 2: Main regulatory tenets by country.

Element	Canada	United States
Rail revenue regulation	With Maximum Revenue Entitlement (MRE), revenues on Western grain movements are capped, and railroads earning revenues above the MRE are fined.	STB annually measures "revenue adequacy," which compares a railroad's return on investment to the industry cost of capital.
Rate challenge procedures	Shippers can challenge unreasonable rates through Final Offer Arbitration, where, if mediation does not work, each party makes a final offer. The arbitrator chooses 1 of 2 final offers, not a middle or mixed approach.	STB has three, cost-based methods to determine rate reasonableness: The first two, Stand-Alone Cost (SAC) and Simplified-SAC, model what a hypothetical entrant railroad would charge. The third, Three-Benchmark (3B), compares a railroad's rates against three cost benchmarks. The methods vary in several dimensions, such as complexity, time to complete, and remedy.[2]
Competitive switching	Eligibility is relatively clear. Shippers within 30 kilometers (18 miles) of an interchange with another carrier can switch carriers. Railroads are compensated at a pre-determined rate.[1]	It is available, but conditions in which it will be granted are less clear. This topic remains an open proceeding at STB.

[1] Competitive (aka reciprocal) switching is known as "interswitching" in Canada. Added in 2018, a shipper can also pursue a "long-haul interswitch" (up to 1,200 km or 745 miles) under certain conditions.
[2] STB's three current methods are Stand-Alone Cost (SAC), Simplified-SAC, and Three-Benchmark. The SAC procedure asks a shipper to construct a hypothetical, perfectly efficient railroad. This imaginary railroad replaces the shipper's current carrier to simulate the competitive rate that would exist in a contestable market. The Simplified-SAC method replaces the SAC design of a hypothetical stand-alone railroad with the actual railroad involved. Three-Benchmark involves comparing a ratio (the disputed rate to variable cost) on three dimensions: with other potentially captive traffic, with similar traffic, and with the average markup the railroad needs to be revenue adequate.
Source: USDA, Agricultural Marketing Service, roll-up of various descriptions in the study.

Although both countries have a recent history of deregulation, both countries still limit railroad rates to some degree, and each approach those limitations differently. Canada designed its Maximum Revenue Entitlement policy to allow railroads some freedom in setting rates, but it also protects shippers from exorbitant rates. Annually, STB determines whether railroads earned sufficient revenues to cover their costs of capital, but there is no explicit revenue cap in the United States comparable to Canada's.

In terms of rate review, both countries offer mediation to resolve the dispute. In Canada, if mediation proves unsuccessful, parties can use Final Offer Arbitration (FOA), where CTA chooses the more reasonable final offer from the shipper and railroad. In the United States, STB is considering adopting a new method called Final Offer Rate Review (FORR), with FOA as a feature.[1] However, current STB methods to determine rate reasonableness—Stand-Alone Cost (SAC), Simplified-SAC, or Three-Benchmark (3B)—are largely based on models or measures of rail costs.

Competitive (or inter-) switching is available for shippers in both countries, but eligibility is more clear-cut in Canada. In Canada, an interswitch allows shippers served by a single railroad to switch to a more distant, competing railroad within 30 kilometers (about 18 miles) of a shipment's origin. In the United States, an STB-mandated competitive switch requires the shipper demonstrate uncompetitive conduct by the railroad. Few requests have been filed in the United States, and none have been granted.[2]

Signs of Cross-Border Knowledge Sharing

In recent years, there are signs each country has looked to the other for guidance in overseeing rail transportation. If STB adopts some form of FOA in rail rate review, that aspect of the rate review process will be very similar across the two countries. Lessons learned from Canada's experience with FOA (as detailed in the report) could help shape U.S. FORR. On the other hand, the researchers contend the two countries are unlikely to converge at all on their approach to competitive switching, given recent changes to the policy in Canada and little attention from STB in the United States. Finally, the issue of rail revenue regulation offers some potential for beneficial information sharing: although STB shows no signs of implementing a targeted revenue cap like MRE, revenue adequacy is an undeveloped tenet of STB's approach to rate constraints. If it is developed further, the United States will likely gain from understanding Canada's experience with MRE.

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[1] In September 2019, STB proposed a new procedure for challenging the reasonableness of rates in small cases called "Final Offer Rate Review" (Docket No. EP 755).
[2] Surface Transportation Board. Decision. Docket No. EP 711: Petition for Rulemaking to Adopt Revised Competitive Switching Rules. July 27, 2017.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
03/17/21	214	299	231	212	258	230
03/10/21	211	295	233	207	257	229

[1]Indicator: Base year 2000 = 100. Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge ($/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan ($/metric ton); n/a = not available.
Source: USDA, Agricultural Marketing Service.

Table 2

Market Update: U.S. origins to export position price spreads ($/bushel)

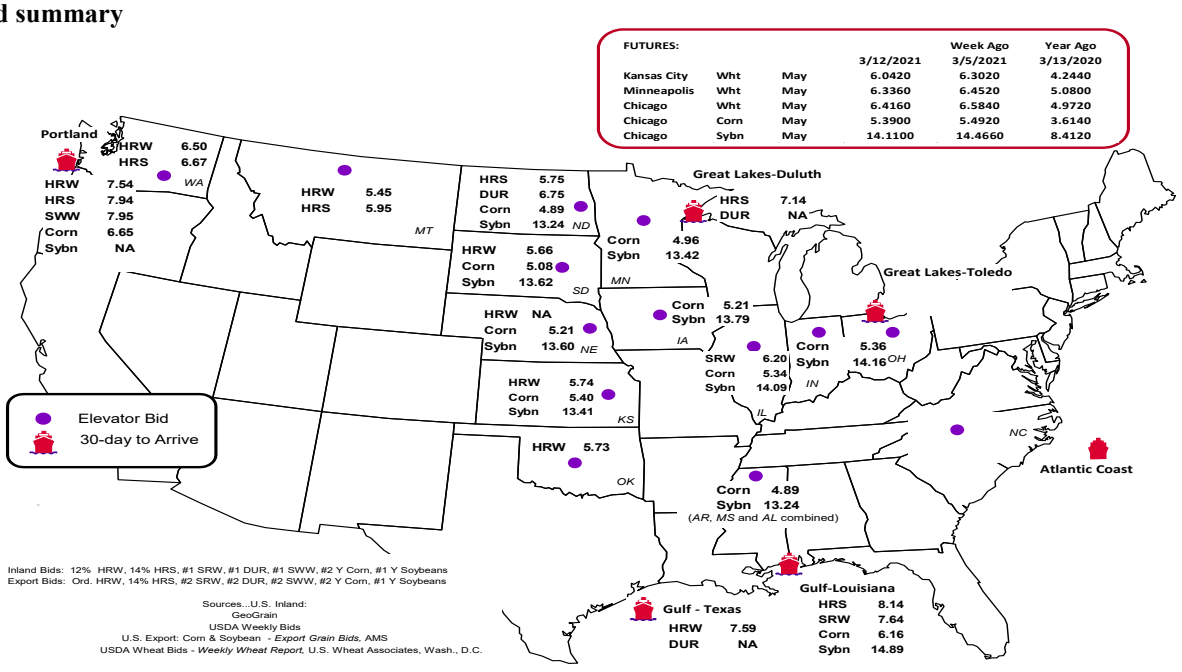
Commodity	Origin–destination	3/12/2021	3/5/2021
Corn	IL–Gulf	-0.82	-0.85
Corn	NE–Gulf	-0.95	-0.96
Soybean	IA–Gulf	-1.10	-1.16
HRW	KS–Gulf	-1.85	-1.85
HRS	ND–Portland	-2.19	-2.20

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

Table 3

Rail deliveries to port (carloads)[1]

For the week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-border Mexico[3]
3/10/2021[p]	1,772	1,936	7,939	98	11,745	3/6/2021	2,948
3/03/2021[r]	1,821	2,033	6,861	511	11,226	2/27/2021	2,849
2021 YTD[r]	18,740	18,316	68,958	7,175	113,189	2021 YTD	23,354
2020 YTD[r]	3,965	5,926	41,695	1,904	53,490	2020 YTD	22,907
2021 YTD as % of 2020 YTD	473	309	165	377	212	% change YTD	102
Last 4 weeks as % of 2020[2]	805	245	144	185	181	Last 4wks. % 2020	99
Last 4 weeks as % of 4-year avg.[2]	273	116	111	120	124	Last 4wks. % 4 yr.	122
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

[1]Data is incomplete as it is voluntarily provided.

[2] Compared with same 4-weeks in 2020 and prior 4-year average.

[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads. to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

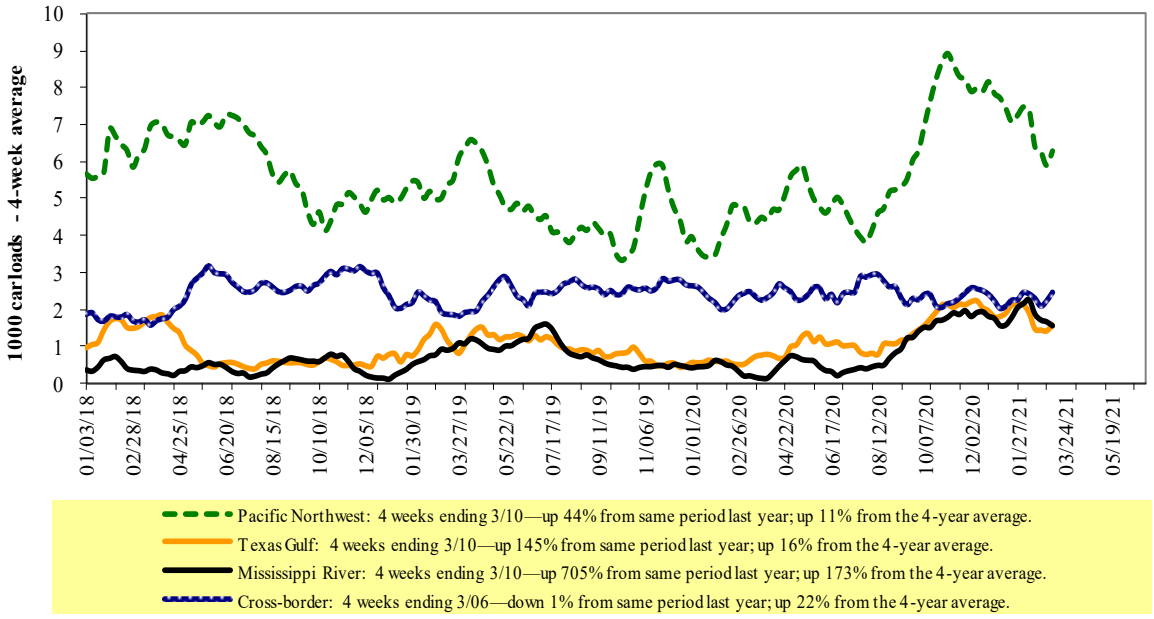
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending:	East		West			U.S. total	Canada	
3/6/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,999	2,380	14,775	1,053	6,244	26,451	4,935	5,764
This week last year	1,730	2,328	10,561	1,302	4,873	20,794	3,108	3,967
2021 YTD	18,895	24,137	117,749	8,990	57,884	227,655	43,318	43,119
2020 YTD	17,269	22,252	103,388	10,930	43,964	197,803	32,305	36,396
2021 YTD as % of 2020 YTD	109	108	114	82	132	115	134	118
Last 4 weeks as % of 2020*	120	111	113	84	133	116	140	123
Last 4 weeks as % of 3-yr. avg.**	115	98	114	85	120	112	122	120
Total 2020	91,659	130,865	613,630	57,782	296,701	1,190,637	239,124	261,778

*The past 4 weeks of this year as a percent of the same 4 weeks last year.

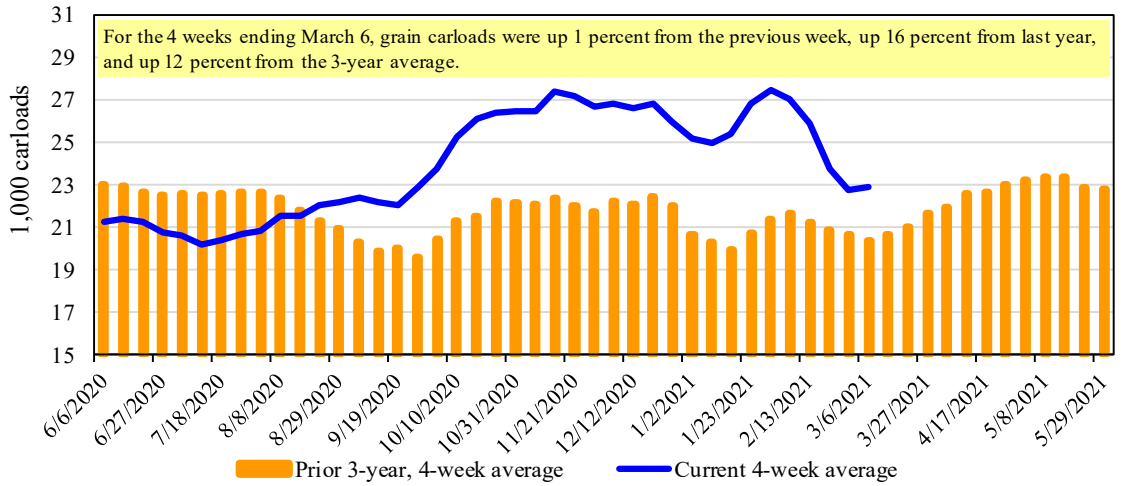
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 5

Railcar auction offerings[1] ($/car)[2]

For the week ending:		Delivery period							
3/11/2021		Mar-21	Mar-20	Apr-21	Apr-20	May-21	May-20	Jun-21	Jun-20
BNSF[3]	COT grain units	no bids	no offer	0	0	0	no bid	no bids	0
	COT grain single-car	no bids	no offer	0	0	0	0	0	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no bid	no offer	no bid	n/a	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction. n/a = not available.

[3]BNSF - COT = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

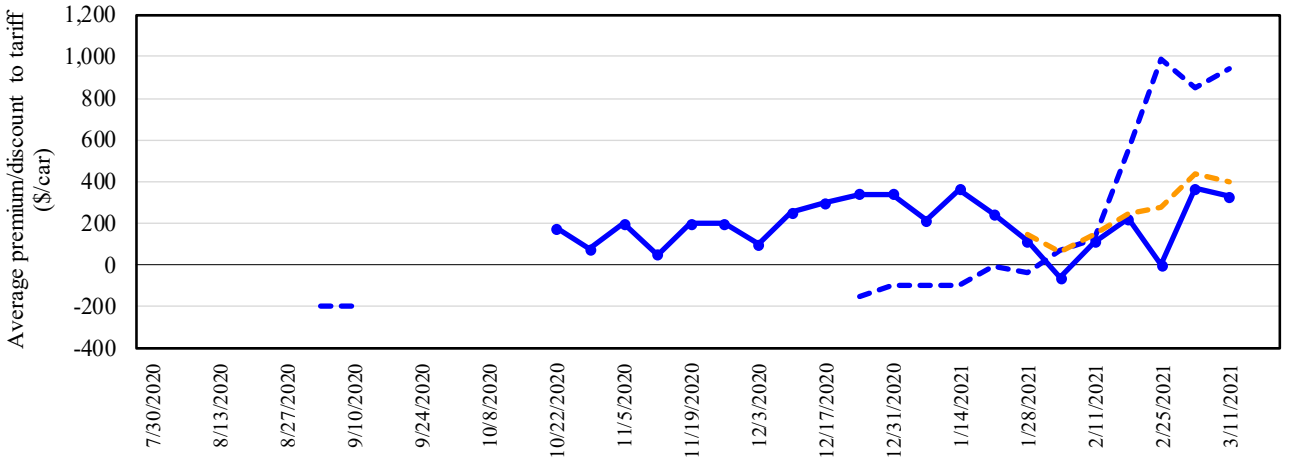
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: USDA, Agricultural Marketing Service.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/ supply.

Figure 4
Bids/offers for railcars to be delivered in March 2021, secondary market

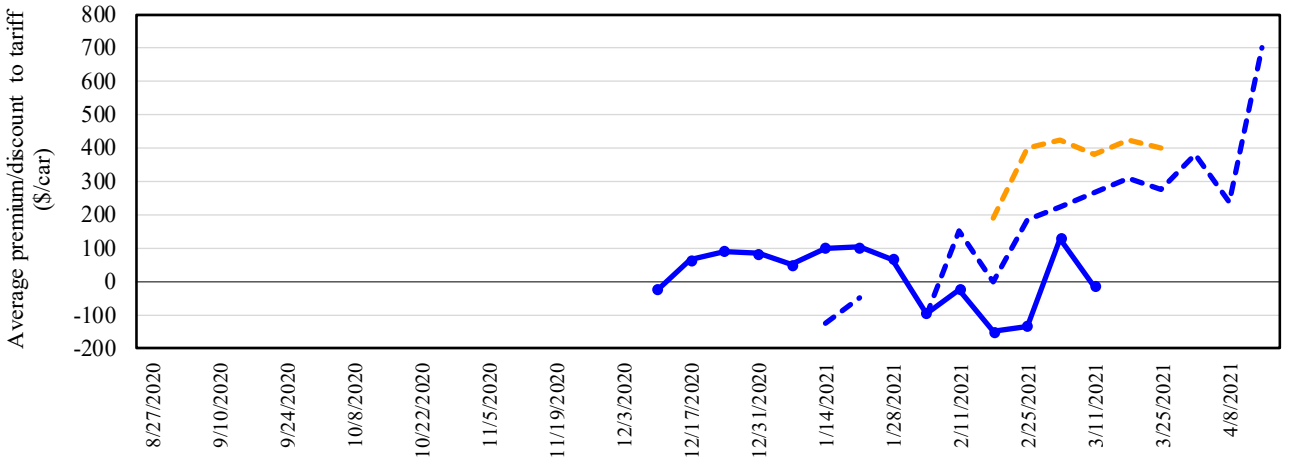


3/11/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$238	$419

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $41 this week and are $41 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Figure 5
Bids/offers for railcars to be delivered in April 2021, secondary market



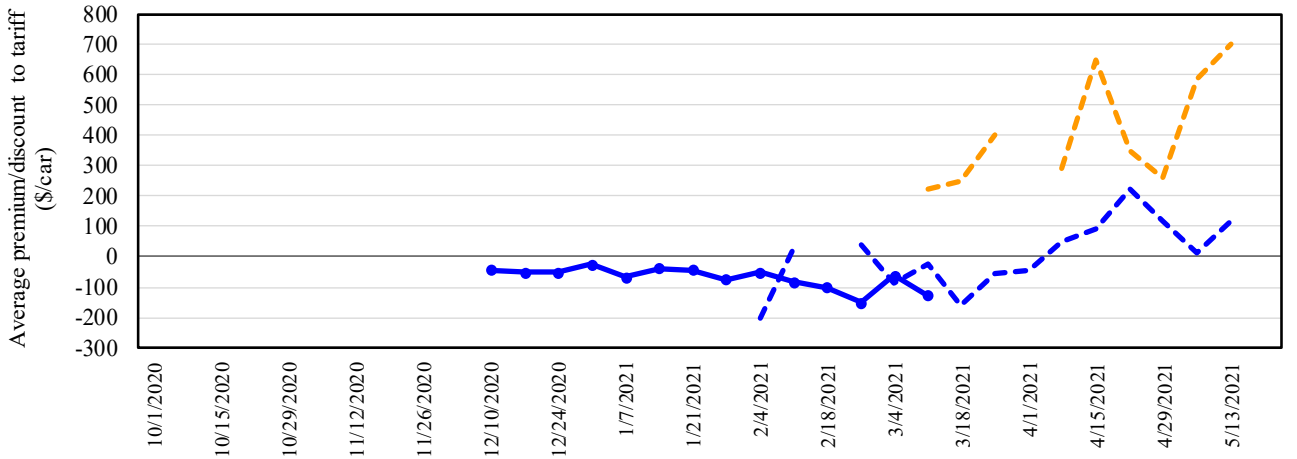
3/11/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$56	$25

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $144 this week and are $144 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Figure 6

Bids/offers for railcars to be delivered in May 2021, secondary market



3/11/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$142	-$113

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $65 this week and are $102 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Table 6

Weekly secondary railcar market ($/car)[1]

For the week ending: 3/11/2021		Delivery period					
		Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**238**	**(56)**	**(142)**	**(200)**	**(150)**	**(150)**
	Change from last week	(125)	(106)	(67)	0	0	0
	Change from same week 2020	425	69	n/a	n/a	n/a	n/a
	UP-Pool	**419**	**25**	**(113)**	**n/a**	**(100)**	**(213)**
	Change from last week	44	(181)	(63)	n/a	0	(63)
	Change from same week 2020	494	129	(13)	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad.

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff rail rates for unit and shuttle train shipments[1]

March 2021	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,983	$61	$40.16	$1.09	-1
	Grand Forks, ND	Duluth-Superior, MN	$4,208	$0	$41.79	$1.14	-3
	Wichita, KS	Los Angeles, CA	$7,115	$0	$70.66	$1.92	-2
	Wichita, KS	New Orleans, LA	$4,525	$107	$46.00	$1.25	-1
	Sioux Falls, SD	Galveston-Houston, TX	$6,851	$0	$68.03	$1.85	-2
	Colby, KS	Galveston-Houston, TX	$4,801	$117	$48.84	$1.33	-1
	Amarillo, TX	Los Angeles, CA	$5,121	$163	$52.47	$1.43	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$121	$39.93	$1.01	-2
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$26	$24.63	$0.63	1
	Indianapolis, IN	Atlanta, GA	$5,979	$0	$59.37	$1.51	3
	Indianapolis, IN	Knoxville, TN	$5,040	$0	$50.05	$1.27	3
	Des Moines, IA	Little Rock, AR	$3,900	$75	$39.47	$1.00	1
	Des Moines, IA	Los Angeles, CA	$5,780	$219	$59.57	$1.51	0
Soybeans	Minneapolis, MN	New Orleans, LA	$5,246	$97	$53.06	$1.44	40
	Toledo, OH	Huntsville, AL	$6,595	$0	$65.49	$1.78	17
	Indianapolis, IN	Raleigh, NC	$7,125	$0	$70.75	$1.93	3
	Indianapolis, IN	Huntsville, AL	$5,247	$0	$52.11	$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	$4,645	$121	$47.33	$1.29	-1
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,018	$0	$39.90	$1.09	-3
	Wichita, KS	Galveston-Houston, TX	$4,236	$0	$42.07	$1.14	-3
	Chicago, IL	Albany, NY	$6,376	$0	$63.32	$1.72	-10
	Grand Forks, ND	Portland, OR	$5,676	$0	$56.37	$1.53	-2
	Grand Forks, ND	Galveston-Houston, TX	$5,996	$0	$59.54	$1.62	-2
	Colby, KS	Portland, OR	$6,012	$192	$61.61	$1.68	-2
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	0
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	$3,820	$121	$39.13	$0.99	-2
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$94	$43.84	$1.11	1
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	0
	Council Bluffs, IA	Stockton, CA	$5,100	$0	$50.65	$1.29	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,850	$0	$58.09	$1.58	0
	Minneapolis, MN	Portland, OR	$5,900	$0	$58.59	$1.59	0
	Fargo, ND	Tacoma, WA	$5,750	$0	$57.10	$1.55	0
	Council Bluffs, IA	New Orleans, LA	$4,875	$139	$49.79	$1.36	-2
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$196	$54.19	$1.47	-2

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

[2]Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

[3]Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

[4]Percentage change year over year (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: March 2021							
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	Tariff rate plus fuel surcharge per: metric ton[3]	bushel[3]	Percent change[4] Y/Y
Wheat	MT	Chihuahua, CI	$7,384	$0	$75.45	$2.05	-2
	OK	Cuautitlan, EM	$6,713	$84	$69.44	$1.89	-2
	KS	Guadalajara, JA	$7,471	$611	$82.58	$2.25	0
	TX	Salinas Victoria, NL	$4,347	$51	$44.93	$1.22	0
Corn	IA	Guadalajara, JA	$8,902	$496	$96.02	$2.44	0
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$172	$86.56	$2.20	-1
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$167	$80.03	$2.03	-1
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$467	$92.10	$2.50	0
	NE	Guadalajara, JA	$9,157	$481	$98.48	$2.68	0
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$321	$85.16	$2.32	0
Sorghum	NE	Celaya, GJ	$7,772	$430	$83.80	$2.13	0
	KS	Queretaro, QA	$8,108	$104	$83.91	$2.13	-1
	NE	Salinas Victoria, NL	$6,713	$84	$69.44	$1.76	-1
	NE	Torreon, CU	$7,092	$286	$75.39	$1.91	-1

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

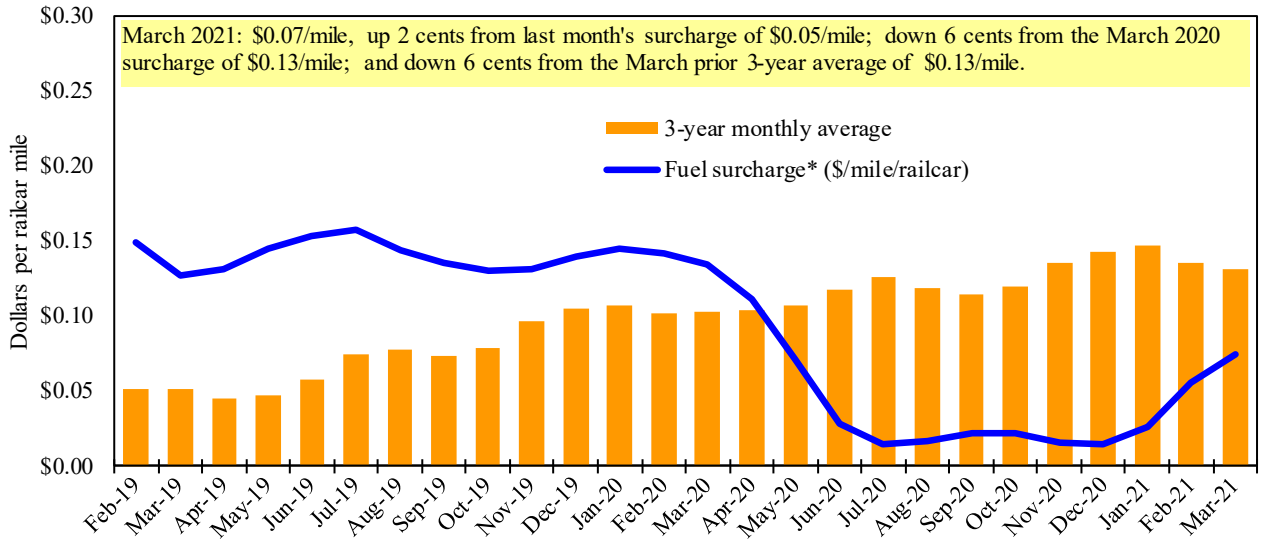
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

Figure 7

Railroad fuel surcharges, North American weighted average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

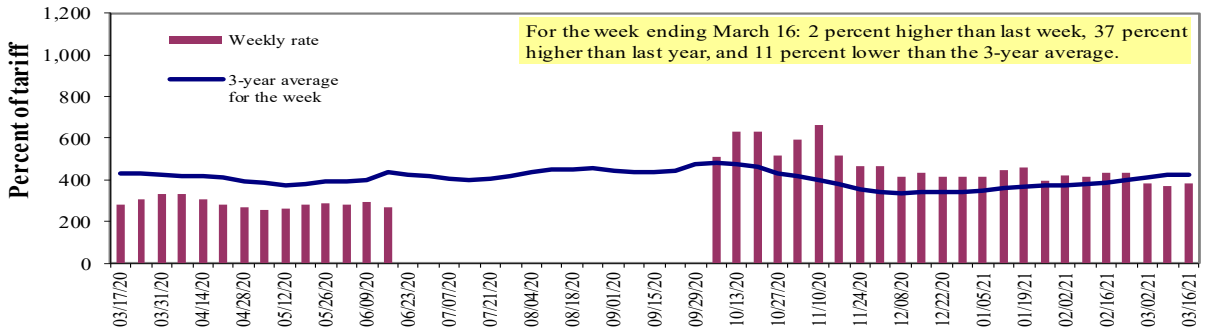
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 8
Illinois River barge freight rate[1,2,3]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
[3]No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.
Source: USDA, Agricultural Marketing Service.

Table 9
Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	3/16/2021	-	-	381	273	293	293	240
	3/9/2021	-	-	372	264	294	294	246
$/ton	3/16/2021	-	-	17.68	10.89	13.74	11.84	7.54
	3/9/2021	-	-	17.26	10.53	13.79	11.88	7.72
Current week % change from the same week:								
	Last year	-	-	37	49	52	52	36
	3-year avg. [2]	-	-	-11	-15	-23	-23	-18
Rate[1]	April	488	415	381	271	281	281	236
	June	468	384	363	256	268	268	229

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to closure.
Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.

Map Credit: USDA, Agricultural Marketing Service

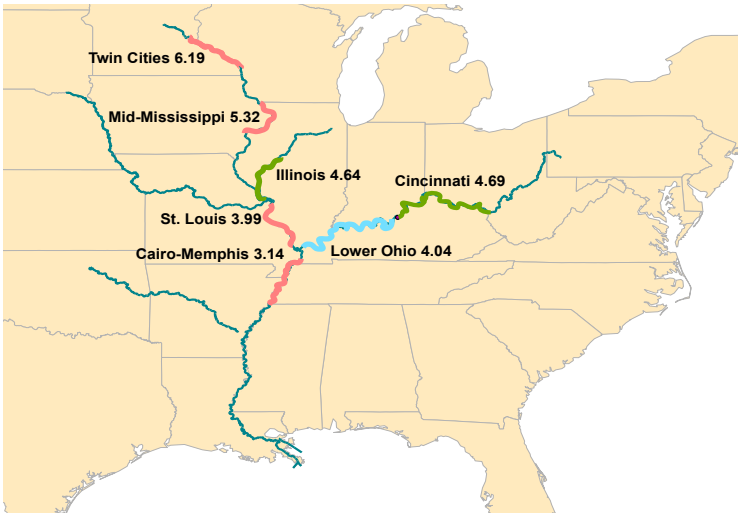
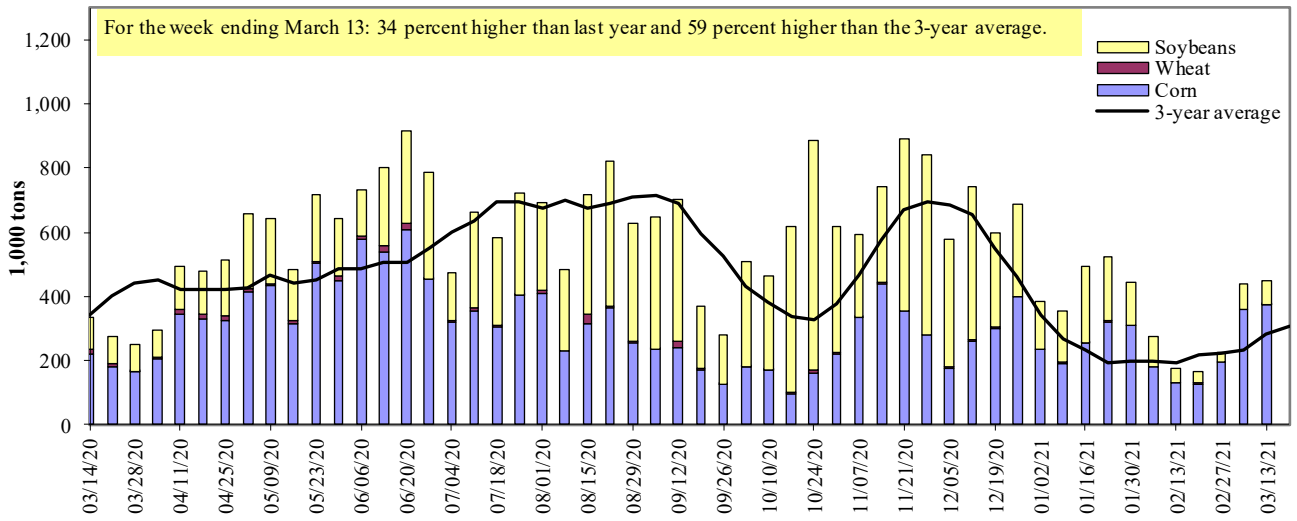


Figure 10

Barge movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



[1] The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers.

Table 10

Barge grain movements (1,000 tons)

For the week ending 03/13/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	372	3	73	0	448
Granite City, IL (L27)	372	3	73	0	448
Illinois River (La Grange)	276	3	78	0	357
Ohio River (Olmsted)	244	0	56	0	299
Arkansas River (L1)	0	29	34	0	63
Weekly total - 2021	615	33	162	0	810
Weekly total - 2020	292	30	210	0	532
2021 YTD[1]	4,956	160	2,561	87	7,763
2020 YTD[1]	2,325	299	2,347	12	4,982
2021 as % of 2020 YTD	213	53	109	750	156
Last 4 weeks as % of 2020[2]	186	35	85	30	136
Total 2020	18,942	1,765	19,205	237	40,149

[1] Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

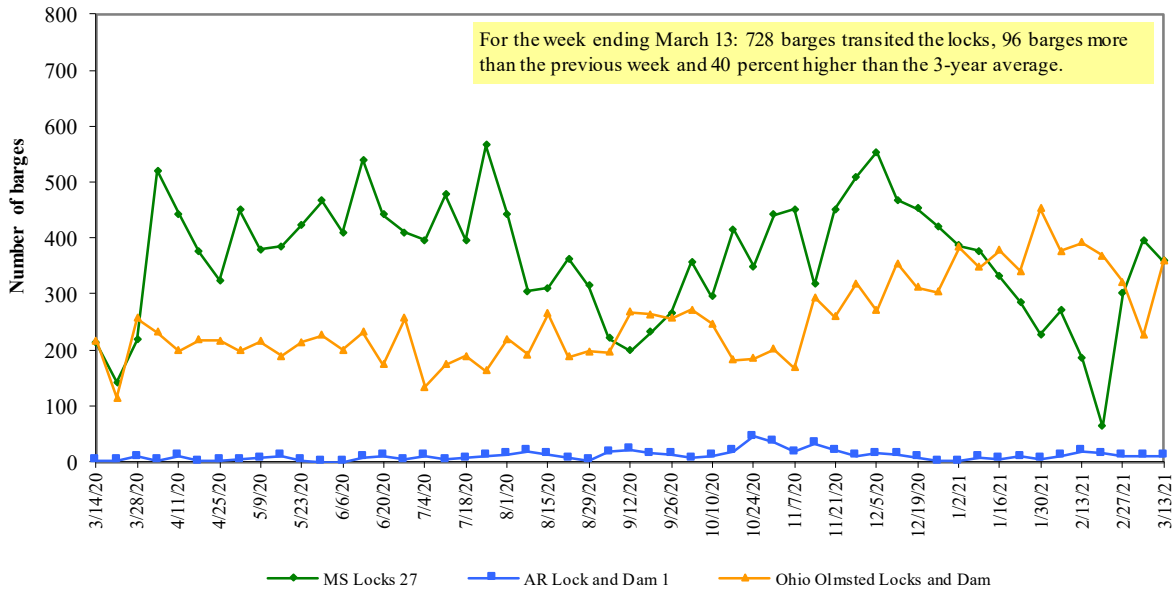
[2] As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

Source: U.S. Army Corps of Engineers.

Figure 11

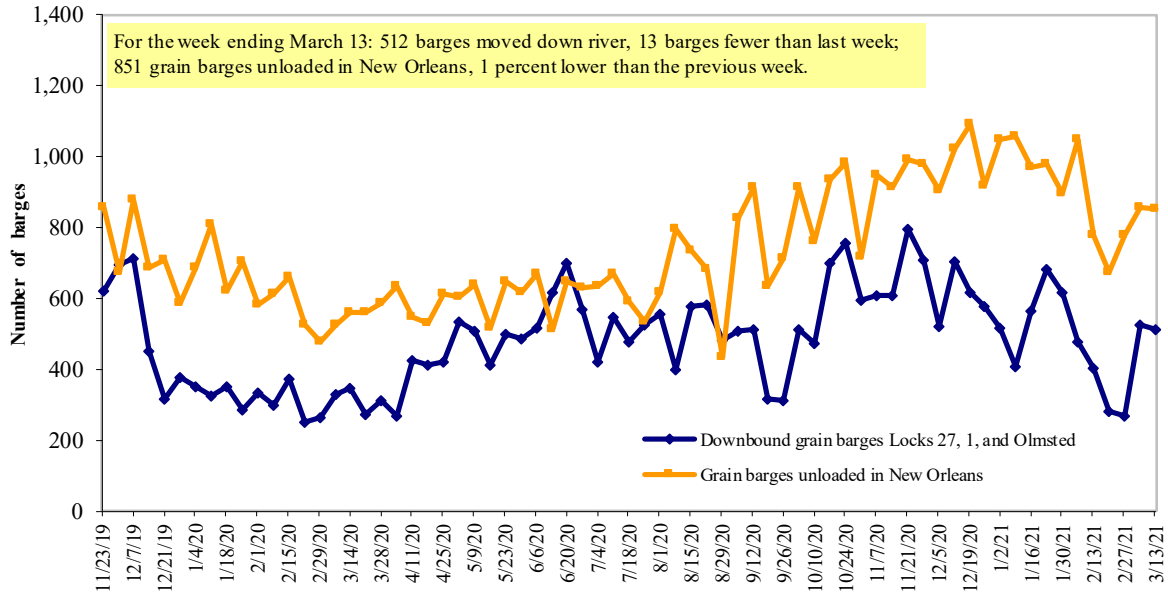
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-highway diesel prices, week ending 3/15/2021 (U.S. $/gallon)

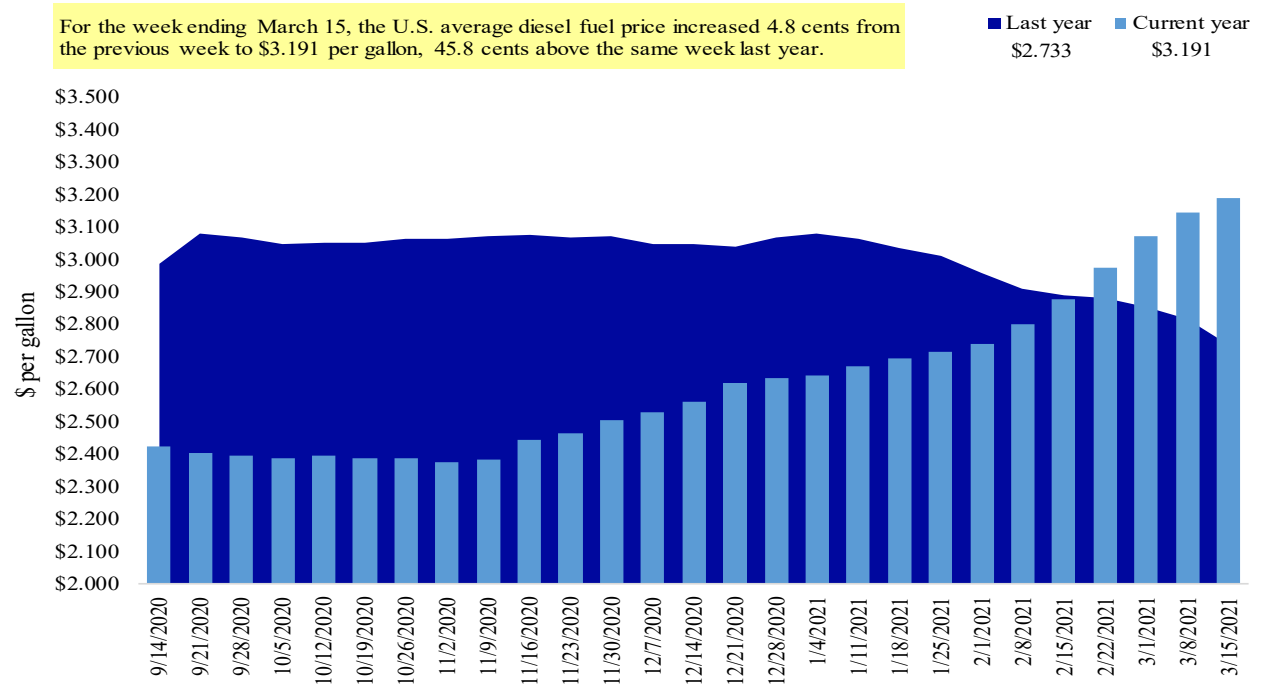
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.148	0.032	0.359
	New England	3.082	0.029	0.164
	Central Atlantic	3.292	0.026	0.303
	Lower Atlantic	3.064	0.037	0.437
II	Midwest	3.169	0.042	0.578
III	Gulf Coast	2.988	0.059	0.484
IV	Rocky Mountain	3.276	0.145	0.534
V	West Coast	3.641	0.048	0.319
	West Coast less California	3.270	0.042	0.316
	California	3.951	0.054	0.326
Total	United States	3.191	0.048	0.458

[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 12

U.S. export balances and cumulative exports (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances[1]									
3/4/2021	1,376	414	1,942	2,138	154	6,024	31,756	7,111	44,892
This week year ago	1,779	337	1,607	1,046	148	4,917	12,881	4,168	21,966
Cumulative exports-marketing year[2]									
2020/21 YTD	6,783	1,341	5,219	4,236	518	18,097	27,763	53,320	99,180
2019/20 YTD	6,994	1,964	5,370	3,707	680	18,714	15,232	30,092	64,038
YTD 2020/21 as % of 2019/20	97	68	97	114	76	97	182	177	155
Last 4 wks. as % of same period 2019/20*	78	127	125	221	105	128	262	192	219
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

[1] Current unshipped (outstanding) export sales to date.

[2] Shipped export sales to date; 2020/21 marketing year now in effect for wheat, corn, and soybeans.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers[1] of U.S. corn

For the week ending 3/04/2021	Total commitments[2]		% change	Exports[3]
	2020/21 current MY	2019/20 last MY	current MY from last MY	3-yr. avg. 2017-19
		- 1,000 mt -		
Mexico	12,143	10,875	12	14,869
Japan	8,425	5,891	43	11,221
Columbia	2,647	2,656	(0)	4,830
Korea	1,761	871	102	4,011
China	18,739	61	30,569	909
Top 5 importers	**43,714**	**20,354**	**115**	**35,840**
Total U.S. corn export sales	**59,519**	**28,113**	**112**	**49,983**
% of projected exports	90%	62%		
Change from prior week[2]	**396**	**1,471**		
Top 5 importers' share of U.S. corn export sales	73%	72%		72%
USDA forecast March 2021	**66,158**	**45,242**	**46**	
Corn use for ethanol USDA forecast, March 2021	**125,730**	**123,368**	**2**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

[3]FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers[1] of U.S. soybeans

For the week ending 3/04/2021	Total commitments[2] 2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
		- 1,000 mt -		- 1,000 mt -
China	35,852	12,138	195	19,106
Mexico	4,432	3,506	26	4,591
Egypt	2,388	2,080	15	2,980
Indonesia	1,704	1,309	30	2,360
Japan	1,779	1,868	(5)	2,288
Top 5 importers	**46,156**	**20,901**	**121**	**31,324**
Total U.S. soybean export sales	**60,432**	**34,260**	**76**	**49,352**
% of projected exports	99%	75%		
change from prior week[2]	**351**	**238**		
Top 5 importers' share of U.S. soybean export sales	76%	61%		**63%**
USDA forecast, March 2021	**61,308**	**45,831**	**134**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

[3]FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers[1] of all U.S. wheat

For the week ending 3/04/2021	Total commitments[2] 2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
		1,000 mt -		- 1,000 mt -
Mexico	3,274	3,311	(1)	3,213
Philippines	2,957	3,092	(4)	2,888
Japan	2,336	2,473	(6)	2,655
Nigeria	1,348	1,358	(1)	1,433
Korea	1,605	1,420	13	1,372
Indonesia	994	971	2	1,195
Taiwan	1,051	1,164	(10)	1,175
Thailand	756	853	(11)	727
Italy	570	782	(27)	622
Colombia	349	698	(50)	618
Top 10 importers	**15,240**	**16,121**	(5)	**15,897**
Total U.S. wheat export sales	**24,120**	**23,632**	2	**23,821**
% of projected exports	90%	90%		
change from prior week[2]	**330**	**452**		
Top 10 importers' share of U.S. wheat export sales	63%	68%		67%
USDA forecast, March 2021	**26,839**	**26,294**	2	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2019/20; Marketing year (MY) = Jun 1 - May 31.

[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.

[3] FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 16

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 03/11/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	488	389	125	2,950	3,334	88	94	118	15,966
Corn	591	370	160	3,311	844	392	294	185	9,969
Soybeans	85	210	41	3,613	1,980	182	210	87	14,028
Total	**1,164**	**969**	**120**	**9,874**	**6,157**	**160**	**163**	**130**	**39,963**
Mississippi Gulf									
Wheat	58	23	253	381	839	45	39	34	3,422
Corn	1,359	1,073	127	9,601	5,241	183	204	210	28,781
Soybeans	336	263	127	8,139	6,408	127	115	83	38,013
Total	**1,752**	**1,359**	**129**	**18,120**	**12,488**	**145**	**160**	**142**	**70,215**
Texas Gulf									
Wheat	127	32	394	615	795	77	106	68	4,248
Corn	0	9	0	107	129	83	84	97	723
Soybeans	0	0	n/a	619	6	n/a	n/a	n/a	2,098
Total	**127**	**41**	**312**	**1,341**	**931**	**144**	**117**	**81**	**7,068**
Interior									
Wheat	47	64	73	490	471	104	114	130	2,263
Corn	216	192	112	1,609	1,531	105	103	115	8,683
Soybeans	108	134	81	1,439	1,548	93	86	94	7,274
Total	**371**	**390**	**95**	**3,538**	**3,550**	**100**	**98**	**108**	**18,220**
Great Lakes									
Wheat	0	1	8	19	1	n/a	n/a	78	891
Corn	0	0	n/a	0	0	n/a	n/a	n/a	111
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	1,111
Total	**0**	**1**	**8**	**19**	**1**	**n/a**	**n/a**	**78**	**2,113**
Atlantic									
Wheat	0	0	n/a	35	0	n/a	n/a	353	65
Corn	0	0	n/a	0	0	n/a	n/a	0	33
Soybeans	17	20	88	760	258	295	190	122	1,870
Total	**17**	**20**	**88**	**795**	**258**	**308**	**231**	**134**	**1,968**
U.S. total from ports*									
Wheat	719	510	141	4,489	5,440	83	91	94	26,854
Corn	2,165	1,643	132	14,628	7,745	189	198	188	48,301
Soybeans	546	626	87	14,570	10,200	143	128	88	64,394
Total	**3,431**	**2,780**	**123**	**33,687**	**23,385**	**144**	**149**	**130**	**139,548**

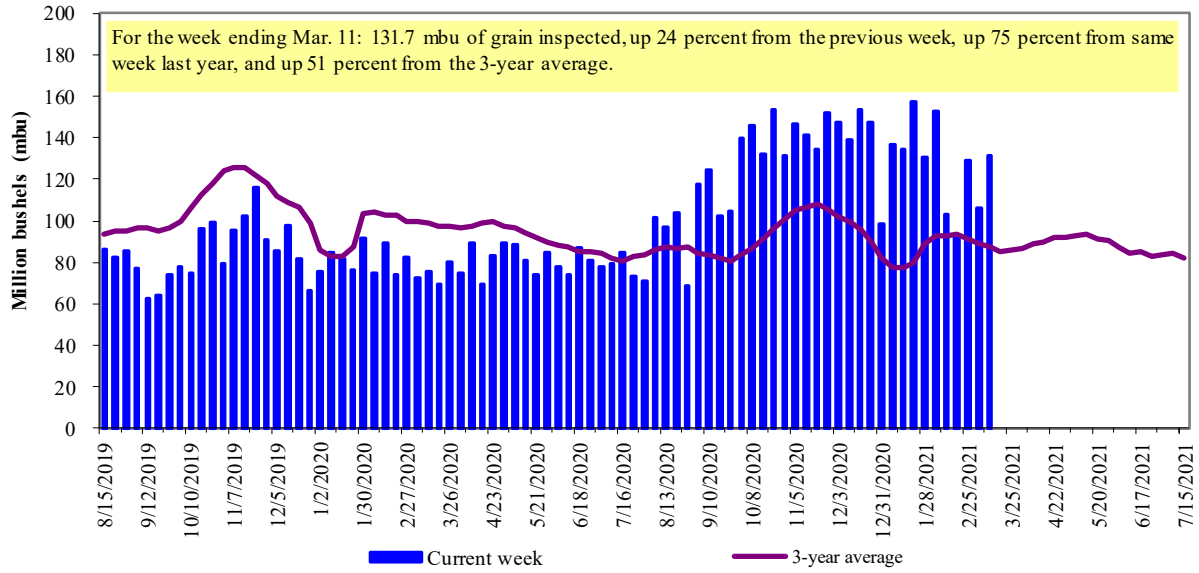
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 14

U.S. grain inspected for export (wheat, corn, and soybeans)

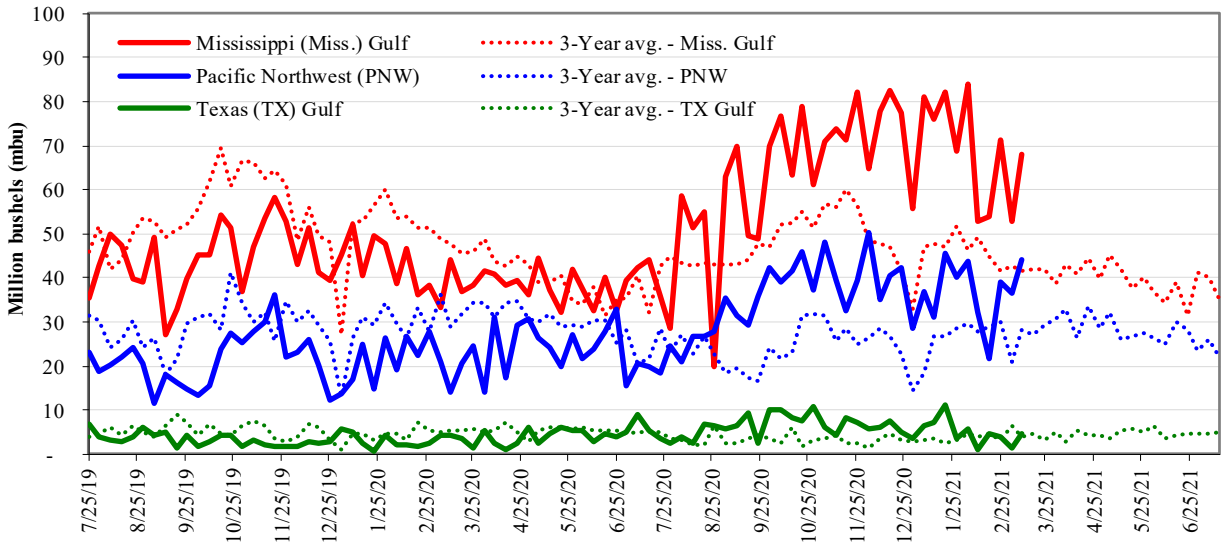


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 03/11/21 inspections (mbu):	
MS Gulf:	67.9
PNW:	44.3
TX Gulf:	4.7

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 29	up 207	up 34	up 21
Last Year (same wk):	up 53	up 13	up 50	up 212
3-yr avg. (4-wk. mov. Avg):	up 59	up 3	up 54	up 64

Source: USDA, Federal Grain Inspection Service.

Table 17

Weekly port region grain ocean vessel activity (number of vessels)

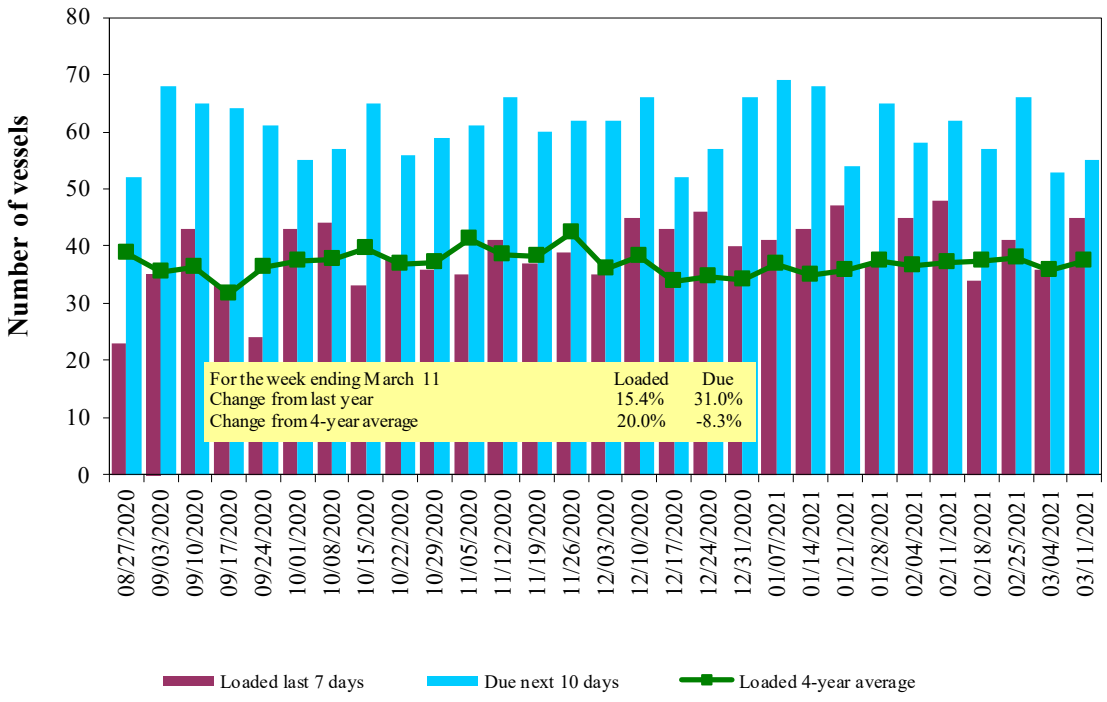
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
3/11/2021	38	45	55	16
3/4/2021	51	36	53	24
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

Note: n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

Figure 16

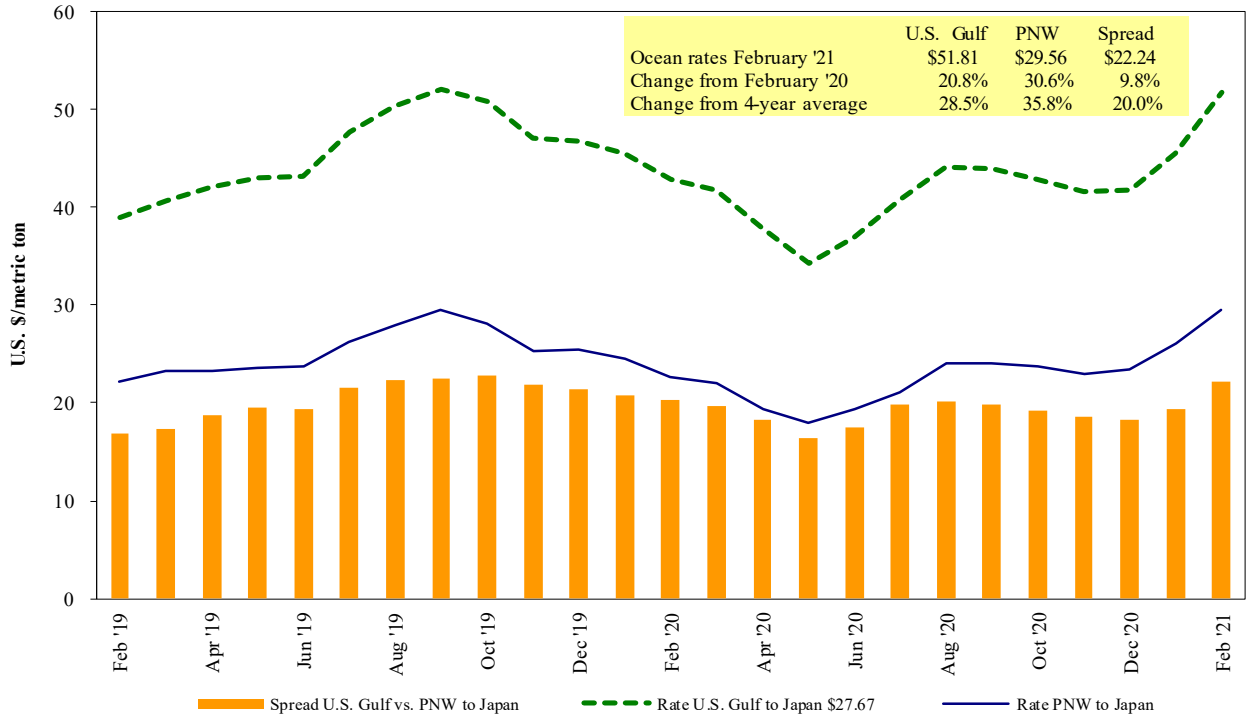
U.S. Gulf[1] vessel loading activity



[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source:USDA, Agricultural Marketing Service.

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 03/13/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Grain	May 25/Jun 25	50,000	46.85 op 47.85
U.S. Gulf	Japan	Heavy grain	Apr 15/May 15	50,000	47.00
U.S. Gulf	Japan	Heavy grain	Apr 1/30	48,000	46.75
U.S. Gulf	South Korea	Heavy grain	Feb 20/28	51,000	51.50
U.S. Gulf	Pt Sudan	Sorghum	Feb 15/25	34,860	143.13*
U.S. Gulf	Vietnam	Corn	Feb 5/15	70,000	47.25
PNW	Japan	Grain	Mar 5/14	28,000	48.10
PNW	Taiwan	Corn	Feb 20/Mar 15	65,000	24.90
Brazil	China	Heavy grain	Mar 21/31	66,000	44.00
Brazil	China	Heavy grain	Mar 21/30	66,000	45.50
River Plate	S. Korea	Corn	May 1/31	68,000	52.60*
Ukraine	China	Corn	Feb 10/17	60,000	36.40 op 38.90

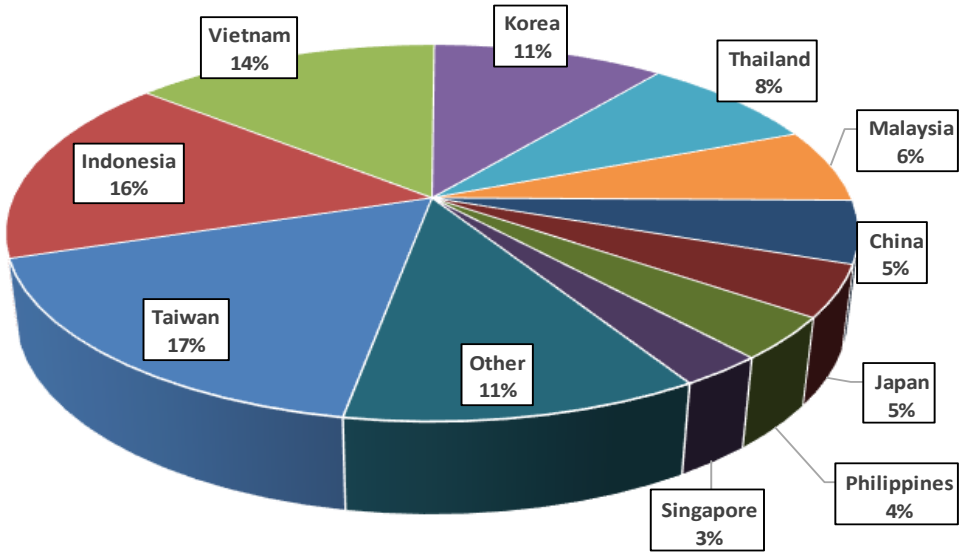
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

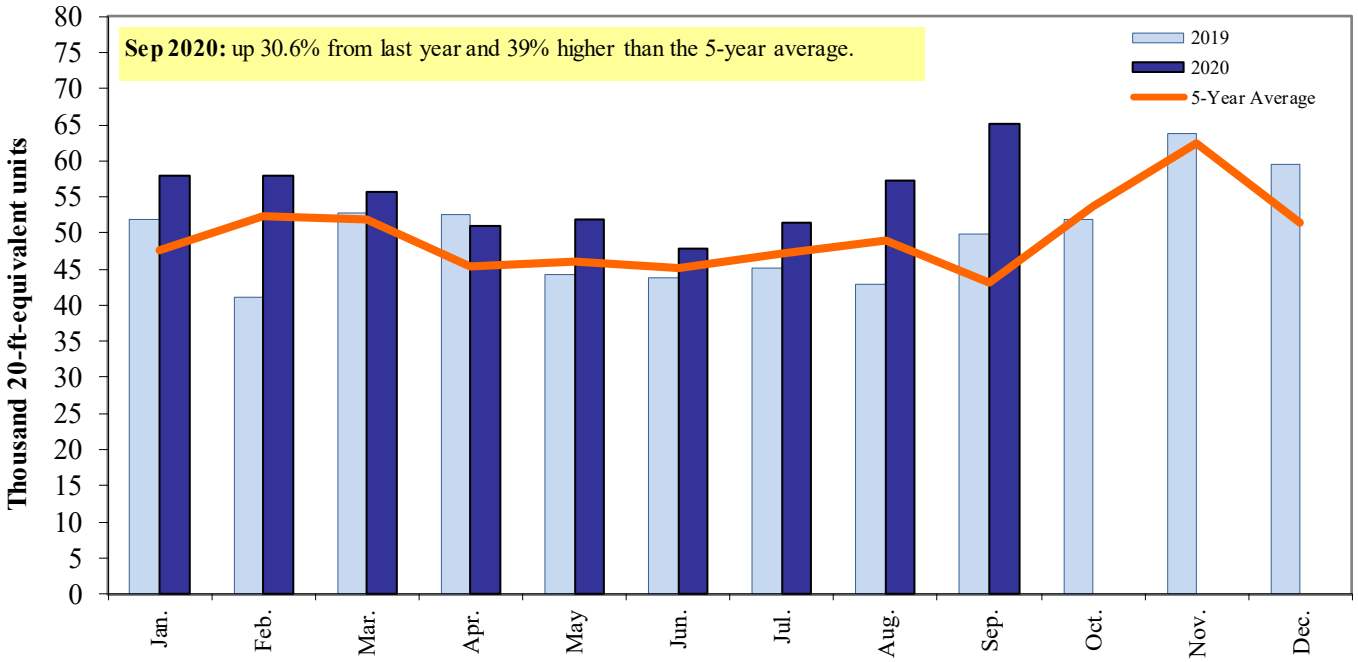
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 19
Monthly shipments of containerized grain to Asia



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

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